

**ACS Vendor Site Visit**

**ACS Site Visit Agenda**  
**Thursday, 8/24/2000**

| <b>Topic</b>  | <b>Time</b> | <b>Contents</b>   | <b>Lead</b>   |
|---|-------------|---|---|
| Introductions and Objectives                              | 10:00-10:15 |   | Kay Jacks   |
| ACS Company Overview                                      | 10:15-11:00 | Organization overview and background (include items such as ACS's goals and vision for the future)  | ACS   |
| Discussion of Common Origination and Disbursement Concept | 11:00-12:00 | Discussion regarding high-level COD concept, progress to date, and current status   | Kay Jacks   |
| Working Lunch   | 12:00-1:00  | Questions and answers from the morning session  | Kay Jacks   |
| Discussion of Critical Requirements                       | 1:00-3:00   | Separate break-out sessions based on critical requirements  |   |
| Functional  |             | <ul style="list-style-type: none"> <li>- Tour of processing operation</li> <li>- Discussion of capability to provide real-time access to data</li> <li>- Ideas to benchmark performance in the future</li> <li>- Discussion of innovations in products outside of the RFMS system (e.g. Just-In-Time funding at HUD)</li> </ul> | Rosemary Beavers<br>John Brooks<br>Jennifer Douglas<br>Mary Haldane<br>Karen Sefton |
| Technical   |             | <ul style="list-style-type: none"> <li>- Demonstration of networking capability</li> <li>- Demonstration of modularity of functionality</li> <li>- Review Enterprise Application Integration (EAI) and Internet Architecture compatibility</li> <li>- Review security capability</li> </ul>                                     | Paul Hill<br>Bruce Kingsley<br>Denise Merchant                                      |

| <b>Topic</b>                  | <b>Time</b> | <b>Contents</b>   | <b>Lead</b>   |
|-------------------------------|-------------|---|---|
| Core Values                   |             | <ul style="list-style-type: none"> <li>- Tour of customer service operation</li> <li>- Meet with front-line employees to discuss work environment</li> </ul>  | Lauren Cato<br>Katie Crowley<br>Kay Jacks<br>Mimi Yeh |
| Creative Solutions for COD    | 3:00-4:00   | Informal discussion of the COD concept and creative solutions/ideas exchange for implementing this new process (refer to section 2 of the Requirements Package you initially received for background material on the COD concept) | ACS   |
| Wrap-up and Questions/Answers | 4:00-4:30   | <ul style="list-style-type: none"> <li>- Next steps in vendor selection process</li> <li>- Questions and Answers</li> </ul>   | Kay Jacks   |

**ACS Site Visit Attendees (SFA and Modernization Partner)**

| <b>Functional Team</b> |   |
|------------------------|---|
| <b>Name</b>            | <b>Role</b>                                 |
| Beavers, Rosemary      | COD Direct Loan Representative              |
| Brooks, John           | COD Functional Representative               |
| Douglas, Jennifer      | FAA Representative, George Mason University |
| Haldane, Mary          | COD Lead                                    |
| Sefton, Karen          | COD Pell Systems Representative             |

| <b>Technical Team</b> |   |
|-----------------------|---|
| <b>Name</b>           | <b>Role</b>                                       |
| Hill, Paul            | COD Chief Information Office (CIO) Representative |
| Kingsley, Bruce       | COD Technology Representative                     |
| Merchant, Denise      | COD Chief Information Office (CIO) Representative |

| <b>Core Values Team</b> |                                      |
|-------------------------|--------------------------------------|
| <b>Name</b>             | <b>Role</b>                          |
| Cato, Lauren            | COD Modernization Partner Lead       |
| Crowley, Katie          | COD Modernization Partner Lead       |
| Jacks, Kay              | General Manager, Schools             |
| Yeh, Mimi               | COD Change Management Representative |

TOTAL ATTENDEES: 12

**ACS Contact Information**

Organization: ACS Government Solutions Group, Inc  
Contact Name: Caroline Raistrick  
Title: Director, Client Services  
Address: One Curie Court  
Rockville, Maryland 20850  
Phone Number: (301) 212-8029  
E-Mail: [caroline.raistrick@acs-gsg.com](mailto:caroline.raistrick@acs-gsg.com)

**Materials Presented by ACS**

An inventory list of materials presented by ACS are listed below. Due to the confidential and proprietary nature of the information, these documents will not be distributed. Access to these materials may be obtained through Steve Shane, Modernization Partner lead.

**Vendor Materials:**

- Corporate Overview
- Functional Requirements Discussion
- Technical Requirements Discussion
  - Pell Grant Organization Chart
  - Pell Grant RFMS & PGRFMS Architecture
  - SYSTEM FLOW – PHASE ONE AND TWO BATCH
- Core Values Discussion
- Customer Care Survey Results (May 8, 2000)
- COD Innovative Solutions

**EDS Vendor Site Visit**

**EDS Site Visit Agenda**  
**Monday, 8/28/00**

| <b>Topic</b>  | <b>Time</b> | <b>Contents</b>  | <b>Lead</b>  |
|---|-------------|--|--|
| Introductions and Objectives                              | 10:00-10:15 |  | Kay Jacks  |
| EDS Company Overview                                      | 10:15-11:00 | Organization overview and background (include items such as EDS's goals and vision for the future)   | EDS  |
| Discussion of Common Origination and Disbursement Concept | 11:00-12:00 | Discussion regarding high-level COD concept, progress to date, and current status  | Kay Jacks<br>Katie Crowley   |
| Working Lunch   | 12:00-1:00  | Questions and answers from the morning session   | Kay Jacks  |
| Discussion of Critical Requirements                       | 1:00-3:00   | Separate break-out sessions based on critical requirements   |  |
| Functional  |             | <ul style="list-style-type: none"> <li>- Tour of processing operation</li> <li>- Discussion of upcoming enhancements</li> <li>- Ideas to benchmark performance in the future</li> </ul>  | Rosemary Beavers<br>John Brooks<br>Julie Bryant<br>Andy Cho<br>Jennifer Douglas<br>Mary Haldane<br>Corwin Jennings<br>David Marr<br>Karen Sefton |
| Technical   |             | <ul style="list-style-type: none"> <li>- Review functional modularity; discuss potential integration approaches</li> <li>- Discuss Enterprise Application Integration (EAI) and Internet Architecture Integration</li> <li>- Review networking capabilities</li> <li>- Review security capabilities</li> </ul> | Paul Hill<br>Bruce Kingsley<br>Denise Merchant   |



| Topic                          | Time      | Contents  | Lead   |
|--------------------------------|-----------|---|--|
| Core Values                    |           | <ul style="list-style-type: none"> <li>- Tour of customer service operation</li> <li>- Observe level of commitment to Higher Education and willingness to become more involved</li> <li>- Review progress in improving employee satisfaction level</li> </ul> <p>Discuss previous experiences of partner capability development</p> | Lauren Cato<br>Katie Crowley<br>Ken Dineen<br>Kay Jacks<br>Jeanne Van Vlandren<br>Mimi Yeh |
| Creative Solutions for COD     | 3:00-4:00 | Informal discussion of the COD concept and creative solutions/ideas exchange for implementing this new process (refer to section 2 of the Requirements Package you initially received for background material on the COD concept)   | EDS  |
| Wrap-up and Questions/ Answers | 4:00-4:30 | <ul style="list-style-type: none"> <li>- Next steps in vendor selection process</li> <li>- Questions and Answers</li> </ul>   | Jeanne VanVlandren   |

**EDS Site Visit Attendees**

| <b>Functional Team</b> |  |
|------------------------|--|
| <b>Name</b>            | <b>Role</b>                                      |
| Beavers, Rosemary      | COD Direct Loan Representative                   |
| Brooks, John           | COD Functional Representative                    |
| Bryant, Julie          | Financial Management System (FMS) Representative |
| Cho, Andy              | Acting Division Director of Financial Reporting  |
| Douglas, Jennifer      | FAA Representative, George Mason University      |
| Haldane, Mary          | COD Lead   |
| Jennings, Corwin       | IT Manager, Schools                              |
| Marr, David            | Modernization Partner Lead                       |
| Sefton, Karen          | COD Pell Systems Representative                  |

| <b>Technical Team</b> |   |
|-----------------------|---|
| <b>Name</b>           | <b>Role</b>                                       |
| Hill, Paul            | COD Chief Information Office (CIO) Representative |
| Kingsley, Bruce       | COD Technology Representative                     |
| Merchant, Denise      | COD Chief Information Office (CIO) Representative |

| <b>Core Values Team</b> |  |
|-------------------------|--|
| <b>Name</b>             | <b>Role</b>  |
| Cato, Lauren            | COD Modernization Partner Lead                       |
| Crowley, Katie          | COD Modernization Partner Lead                       |
| Dineen, Ken             | SFA Business Architecture Modernization Partner Lead |
| Jacks, Kay              | General Manager, Schools                             |
| Van Vlandren, Jeanne    | General Manager, Students                            |
| Yeh, Mimi               | COD Change Management Representative                 |

**EDS Contact Information**

Organization: EDS, Government Services Division  
Contact Name: Bill McGovern  
Title: Modernization Development Manager  
Address: 4200 Wilson Boulevard  
Suite 400  
Arlington, VA 22203  
Phone Number: (703) 741-7409  
E-Mail: [Bill.mcgovern@eds.com](mailto:Bill.mcgovern@eds.com)

**Materials Presented by EDS**

An inventory list of materials presented by EDS are listed below. Due to the confidential and proprietary nature of the information, these documents may not be distributed. Access to these materials may be obtained through Steve Shane, Modernization Partner lead.

**Vendor Materials:****Site Visit Briefing:**

- EDS Company Overview
- Critical Requirements Agenda
- Functional Break Out
- Technical Break Out
  - EDS Technology Policy
- Core Values Break Out
- Creative Solutions for COD
- Wrap Up and Q & A
- EDS Customers
- Service Excellence Dashboard

**Total Systems Vendor Site Visit**

**Total Systems Site Visit Agenda**  
**Tuesday, 8/29/00**

| <b>Topic</b>  | <b>Time</b> | <b>Contents</b>   | <b>Lead</b>   |
|---|-------------|---|---|
| Introductions and Objectives                              | 9:30-9:45   |   | Kay Jacks   |
| Total Systems Company Overview                            | 9:45-10:30  | Organization overview and background (include items such as Total System's goals and vision for the future)   | Total Systems   |
| Discussion of Common Origination and Disbursement Concept | 10:30-11:30 | Discussion regarding high-level COD concept, progress to date, and current status   | Kay Jacks<br>Katie Crowley  |
| Working Lunch   | 11:30-12:30 | Questions and answers from the morning session  | Kay Jacks   |
| Discussion of Critical Requirements                       | 12:30-2:30  | Separate break-out sessions based on critical requirements  |   |
| Functional  |             | <ul style="list-style-type: none"> <li>- Tour of processing operation</li> <li>- Discuss high-level customization requirements and timeframe</li> <li>- Discussion of specific reconciliation tools</li> <li>- Discussion of plans to strengthen Title IV functional knowledge</li> <li>- Ideas to benchmark performance in the future</li> </ul>                           | Rosemary Beavers<br>John Brooks<br>Julie Bryant<br>Andy Cho<br>Katie Crowley<br>Jennifer Douglas<br>Mary Haldane<br>Corwin Jennings<br>Karen Sefton |
| Technical   |             | <ul style="list-style-type: none"> <li>- Review Internet Architecture</li> <li>- Review security capability</li> <li>- Demonstrate network capabilities</li> <li>- Review development environment</li> <li>- Discuss potential integration approaches and Enterprise Application Integration (EAI) architecture</li> <li>- Review overall data center operations</li> </ul> | Paul Hill<br>Bruce Kingsley<br>Denise Merchant  |

| Topic                          | Time      | Contents  | Lead   |
|--------------------------------|-----------|---|--|
| Core Values                    |           | <ul style="list-style-type: none"> <li>- Tour of campus</li> <li>- Review progress in improving employee satisfaction level and other tools used</li> <li>- Discuss how partnering with SFA/ED would fit with TYSYS' long term goals</li> </ul> | Lauren Cato<br>Ken Dineen<br>Kay Jacks<br>David Marr<br>Steve Shane<br>Jeanne Van Vlandren<br>Mimi Yeh |
| Creative Solutions for COD     | 2:30-3:30 | Informal discussion of the COD concept and creative solutions/ideas exchange for implementing this new process (refer to section 2 of the Requirements Package you initially received for background material on the COD concept)               | Total Systems  |
| Wrap-up and Questions/ Answers | 3:30-4:00 | <ul style="list-style-type: none"> <li>- Next steps in vendor selection process</li> <li>- Questions and Answers</li> </ul>   | Kay Jacks  |

**Total Systems Site Visit Attendees**

| <b>Functional Team</b> |  |
|------------------------|--|
| <b>Name</b>            | <b>Role</b>                                      |
| Beavers, Rosemary      | COD Direct Loan Representative                   |
| Brooks, John           | COD Functional Representative                    |
| Bryant, Julie          | Financial Management System (FMS) Representative |
| Cho, Andy              | Acting Division Director of Financial Reporting  |
| Crowley, Katie         | COD Modernization Partner Lead                   |
| Douglas, Jennifer      | FAA Representative, George Mason University      |
| Haldane, Mary          | COD Lead   |
| Jennings, Corwin       | IT Manager, Schools                              |
| Sefton, Karen          | COD Pell Systems Representative                  |

| <b>Technical Team</b> |   |
|-----------------------|---|
| <b>Name</b>           | <b>Role</b>                                       |
| Hill, Paul            | COD Chief Information Office (CIO) Representative |
| Kingsley, Bruce       | COD Technology Representative                     |
| Merchant, Denise      | COD Chief Information Office (CIO) Representative |

| <b>Core Values Team</b> |  |
|-------------------------|--|
| <b>Name</b>             | <b>Role</b>  |
| Cato, Lauren            | COD Modernization Partner Lead                       |
| Dineen, Ken             | SFA Business Architecture Modernization Partner Lead |
| Jacks, Kay              | General Manager, Schools                             |
| Marr, David             | Modernization Partner Lead                           |
| Shane, Steve            | Modernization Partner Lead                           |
| Van Vlandren, Jeanne    | General Manager, Students                            |
| Yeh, Mimi               | COD Change Management Representative                 |



**Total Systems Contact Information**

Organization: Total Systems  
Contact Name: Jason Griffin  
Title: Sales Director  
Address: 1600 1<sup>st</sup> Avenue  
Campus Building C – 4<sup>th</sup> Floor  
Columbus, Georgia 31902  
Phone Number: (706) 644-1157  
E-Mail: [JGGriffin@TotalSystem.com](mailto:JGGriffin@TotalSystem.com)

**Materials Presented by Total Systems**

An inventory list of materials presented by Total Systems are listed below. Due to the confidential and proprietary nature of the information, these documents may not be distributed. Access to these materials may be obtained through Steve Shane, Modernization Partner lead.

**Vendor Materials:**

- TSYS Corporate Overview Presentation
  - The Solution for Global Commerce
  - TS<sup>2</sup> Architecture Overview
  - The Power of TS<sup>2</sup>
- Supplier Diversity Program
- Core Values Handout
- DotsConnect Technical Material
- TS<sup>2</sup> Performance Measurement

**AFSA Vendor Site Visit**

**AFSA Site Visit Agenda**  
**Thursday, 8/31/00**

| <b>Topic</b>  | <b>Time</b> | <b>Contents</b>  | <b>Lead</b>   |
|---|-------------|--|---|
| Introductions   | 8:30-8:45   |  | Kay Jacks   |
| AFSA Company Overview                                     | 8:45-9:30   | Organization overview and background   | AFSA  |
| Discussion of Common Origination and Disbursement Concept | 9:30-10:30  | Discussion regarding high-level COD concept, progress to date, and current status  | Kay Jacks<br>Katie Crowley  |
| Discussion of Critical Requirements                       | 10:30-12:30 | Separate break-out sessions based on critical requirements   |   |
| Functional  |             | <ul style="list-style-type: none"> <li>- Tour of processing operation</li> <li>- Discussion of follow-up questions based on response to packet</li> <li>- Discussion of reconciliation tools</li> </ul>  | John Brooks<br>Julie Bryant<br>Andy Cho<br>Katie Crowley<br>Jennifer Douglas<br>Mary Haldane<br>Corwin Jennings |
| Technical   |             | <ul style="list-style-type: none"> <li>- Review networking capabilities</li> <li>- Review implementation modularity; discuss potential integration approaches</li> <li>- Review Enterprise Application Integration (EAI) and Internet Architecture compatibility</li> <li>- Review security capability</li> </ul>            | Ken Dineen<br>Paul Hill<br>Bruce Kingsley<br>Denise Merchant  |
| Core Values   |             | <ul style="list-style-type: none"> <li>- Tour of customer service operation</li> <li>- Meet with front-line employees to discuss work environment</li> <li>- Demonstrate employee satisfaction within the organization, or tools/plans in place to improve satisfaction</li> <li>- Observe level of commitment to</li> </ul> | Lauren Cato<br>Kay Jacks<br>David Marr<br>Steve Shane<br>Jeanne Van Vlandren<br>Mimi Yeh                        |

| Topic                          | Time       | Contents  | Lead      |
|--------------------------------|------------|---|-----------|
|                                |            | Higher Education<br>- Discuss previous experiences of partner capability development  |           |
| Working Lunch                  | 12:30-1:30 | Questions and answers from the morning session  | Kay Jacks |
| Creative Solutions for COD     | 1:30-2:30  | Informal discussion of the COD concept and creative solutions/ideas exchange for implementing this new process (refer to section 2 of the Requirements Package you initially received for background material on the COD concept) | AFSA      |
| Wrap-up and Questions/ Answers | 2:30-3:00  | - Next steps in vendor selection process<br>- Questions and Answers   | Kay Jacks |

**AFSA Site Visit Attendees**

| <b>Functional Team</b> |  |
|------------------------|--|
| <b>Name</b>            | <b>Role</b>                                      |
| Brooks, John           | COD Functional Representative                    |
| Bryant, Julie          | Financial Management System (FMS) Representative |
| Chow, Andy             | Acting Division Director of Financial Reporting  |
| Crowley, Katie         | COD Modernization Partner Lead                   |
| Douglas, Jennifer      | FAA Representative, George Mason University      |
| Haldane, Mary          | COD Lead   |
| Jennings, Corwin       | IT Manager, Schools                              |

| <b>Technical Team</b> |  |
|-----------------------|--|
| <b>Name</b>           | <b>Role</b>  |
| Dineen, Ken           | SFA Business Architecture Modernization Partner Lead |
| Hill, Paul            | COD Chief Information Office (CIO) Representative    |
| Kingsley, Bruce       | COD Technology Representative                        |
| Merchant, Denise      | COD Chief Information Office (CIO) Representative    |

| <b>Core Values Team</b> |                                      |
|-------------------------|--------------------------------------|
| <b>Name</b>             | <b>Role</b>                          |
| Cato, Lauren            | COD Modernization Partner Lead       |
| Jacks, Kay              | General Manager, Schools             |
| Marr, David             | Modernization Partner Lead           |
| Shane, Steve            | Modernization Partner Lead           |
| Van Vlandren, Jeanne    | General Manager, Students            |
| Yeh, Mimi               | COD Change Management Representative |

TOTAL ATTENDEES: 17

**AFSA Contact Information**

Organization: AFSA Data Corporation  
Contact Name: Richard K. Schnacker  
Title: Chief Information Officer  
Address: One World Trade Center  
Suite 2200  
Long Beach, CA 90831  
Phone Number: (310) 513-2894  
E-Mail: [kschnacker@afsa.com](mailto:kschnacker@afsa.com)

**Materials Presented by AFSA**

An inventory list of materials presented by AFSA are listed below. Due to the confidential and proprietary nature of the information, these documents may not be distributed. Access to these materials may be obtained through Steve Shane, Modernization Partner lead.

**Vendor Materials:**

- AFSA Overview Binder
  - AFSA Participants
  - Corporate Profile
  - Appworks
  - Employee Satisfaction
  - RFI Response
  - Higher Edge Products Overview



**COD Overview**  
**Presented by SFA and Modernization Partner**